

Version Update 25.10.22

Prime Support Centre - Forms

**Support Centre** 

**Prime Ecosystem** 

Instructions | How to create a form using a template









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	s Scope of works customer sign off		Q
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t Harris	Tags		:
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e Client	Re 123		
on Harris	YOU CAN TYPE ADDITIONAL INFORMATION OR DETAILS AS REQUIRED.		
Manager In Harris	We has organised repairs to your propertocated at 240 Waterworks Rd, Ashgrove, QLD 4060 .		
vieor o Harm	Please find enclosed a copy of your Scopy of Works organised by your insurer.		
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	Name: Scott Harris typed into form.		
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	Authorised Items Only (Sent Estimates Only)			8
	Show margin in grand total			
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tt Harris 0400111222	Show tax in grand total			0
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ate Refresh	Show Only Item Type		Delete	1
te	Show Item Tax Status			8
	Show Category Tag Breakdown	Material Labour	Total	
os Removal	Show Trade Breakdown	Click Update to confirm		
e	Show Item Type Breakdown	1/ea Selections. 5/ea	\$500.00	
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		Sub Total	\$500.00	
		Margin	\$150.00	
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inance	QLD 4060					
Documents *						

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PRIME		Pre support@primeeco 240 Waterworks P	ne Ecosystem 1800 338 266 pstlem.com.au bad. Ashgrove Alyson Harris		
0206020					
Scott Hams 340 Wateworks Rd, Ashgrove QLD 4080					
Dear Scott Hams .					
Per 122					
YOU CAN TYPE ADDITIONAL INFORMATION OR DETAILS AS REQU	IFED.				
We has organised repairs to your property located at240 Waterworks #	ld, Ashgrove, QLD 4060				
Please find enclosed a copy of your Scope of Works organised by your	insurer.				
SCOPE OF WO	RKS				
Name: Sooth Hanla Contact No: 0400111222					
Estimate					
test	Material	Labour	Total		
Asbestos Removal					
test; test	194	5 14	\$500.00		
			\$500.00		
Totals			Totals		
		Sub Total	\$500.00		
		Margin	\$150.00		
		067	\$45.00		
		7.44	PT1 7 10		

9. If you are happy with your preview you can select to Generate your form which will finalise it and create a PDF version which can be distributed to customers/clients as required.

DC460 240 V	Vaterworks Rd	Ashgrove, QLD, 4060 (Brisbane Metro)		C Works in Progress Op	en
iome Client   123 1 L	Job Job			Sensitive Home Uninhabitable	e 9
Summary	* Forms List				
Customer Scott Harris	Title	Scope of works customer sign off		~	,
Preferred Number 0400111222	Notes	Additional Notes			
Email No Email	Linked Document	No document linked			
240 Waterworks Rd. Ashgrove, QLD, 4000				Save & Preview PDF Generate & View	
Client Some Client Assigned	Autosave e	nabled Last saved 2nd Aug, 2021 2:42:22 pm	Select either Generate	Cancel Sav	•
Alyson Harris Case Manager	Template *		version of Form.		
Alyson Harris Sepervisor	Scope of works cust	ymer sign off	0	a	×
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orms	Scott Harris 240 Waterworks	Rd, Ashgrove			
inance	QLD 4060				
Documents	-				

When you go back to the Forms list you will now see a PDF icon which you can select to download and view your generated form.

You can also see who created the form and when it was generated into a PDF.

	Forms 🚱		
Customer Scott Hama	Events External Events On Events		
Preferred Number 0400111222	Forms External Forms Sile Forms		
B Email No Email	Forms	All forms created and/or generated	0
240 Waterworks Rd, Ashgrove, QLD,	Form Templates. Q Form Title Create New Form	Isted.	1
Client Some Client	Subcontractor Quote Request Subcontractor Quote Request		B
Assigned Alyson Harrs	Created by Paul Brands @ 26th Jul, 2021 12:56 pm	Generated @ 26th Jul, 2021 12:56 pm	
Case Manager Alyson Hams	Work Order Work Order		-
Supervisor Alyson Harris	Created by Ben Johnston @ 28th Jul, 2021 11:10 am	Generated @ 28th Jul, 2021 11:10 am	0
L Extimator	B West Deter West Order		2
Show More	Created by Ben Johnston @ 20th Jul, 2021 11:24 am	Generated @ 20m Jul, 2021 11:24 am	1
Filter Menu. Q	Estimate Test Estimate Test		
General	Created by Alyson Harris @ 29th Jul. 2021 11.13 am	×	
Overview	Scope of works customer sign off Scope of works customer sign off		
Details	Created by Alyson Harris @ 2nd Aug. 2021 1:27 pm	Generated @ 2nd Aug. 2021 3:43 pm	
Reminders			
Appointments 🚺	Who created the form		
Forms	PDF, icon	(When the form was generated)	

